



Lotus

Quickr® 8

Services for Lotus Domino – Updated for version 8.2

QUICK REFERENCE GUIDE

Getting to Know Quickr

Quickr is a Web-based application that enables teams to collaborate on and manage shared information. Documents such as posts, tasks, and events are organized in Quickr places within rooms, libraries, folders, and subfolders. Quickr Connectors integrate Quickr with your current desktop applications such as Lotus Sametime, and Microsoft Office.

Since Quickr is customizable, the way Quickr places look and function can vary significantly. The illustration below shows a typical Quickr place created using the Standard template.

The screenshot shows the Lotus Quickr 8 interface. Annotations point to various features:

- Table of contents containing rooms and pages.** Points to the left sidebar menu.
- Location indicator** Points to the breadcrumb navigation: "You are in: Marketing Department > Home".
- Search box. See *Performing a Search*, page 5.** Points to the search bar at the top right.
- Click to open the *Create* page. See *Creating Documents*, page 4.** Points to the "New Page or Folder..." button in the sidebar.
- What's New area. See *Viewing Daily or Weekly News*, page 3.** Points to the "What's New" section in the main content area.
- Posts. See *Creating Documents*, page 4** Points to the list of documents in the "What's New" section.

TABLE OF CONTENTS

Folders, Rooms, and Forms

Creating a Folder
Managing and Using Folders
Creating a Room
Editing Rooms
Creating a Form
Editing Forms

Quickr Folders

Calendar Views
Subscribing to Events
Viewing Daily or Weekly News
Creating a Task
Viewing and Editing Tasks
Viewing and Editing an Index

Working with Documents

Creating Documents
Checking Documents In and Out
Moving and Copying Documents
Deleting Documents
Importing Documents
Creating Link Pages

Mail, Blogs, and Search

Setting Up Your Mail
Reading and Creating Mail
Sending Invitations
Sending Newsletters
Creating a Blog Entry
Performing a Search

Help Desk

Adding Groups to a Place
Adding a Logo
Changing the Table of Contents
Subscribing to a Feed

Creating and Managing Folders

A folder is a collection of pages and subfolders. Several types of Quickr folders are available.

Creating a Folder

You can create folders and subfolders if you have Manager access.

1. Click **New Page or Folder** from within the place, room, or folder where you want to create a new folder and choose **Folder**.
2. Choose a folder type (e.g. **Discussion**).
3. Enter a title and description for the folder, choose an option under **Who can add content to this folder?**, and then click **Next**.
4. Select a location for the folder and click **Next**.

Managing and Using Folders

To open a folder: enter the place, room, or folder that contains the folder you want to open. Click on the name of the folder to display its contents.

To rename a folder: open the folder, click **More Actions** and choose **Folder Options**. Enter a new title for the folder, and click **Next** twice.

To change a folder's authoring privileges: open the folder, click **More Actions** and choose **Folder Options**. Choose an option under **Who can add content to this folder?**, and click **Next** twice.

To delete a folder: open the folder, click **More Actions** and choose **Folder Options**. Click **Delete Folder**, choose delete options, and then click **Next**.

To check documents out of a folder: see *Checking Documents In and Out*, page 4.

To move or copy a document in a folder: check the box ☒ next to the document's title, click **More Actions** and choose **Move** or **Copy**. Select the folder where you want to move or copy the document to and click **Next**.

Rooms

A room is a private space that can contain folders and forms, as well as other rooms. The Room Security folder in a room defines access levels for room members, allowing you to limit access to certain content.

Creating a Room

1. Enter the place or room where you want to create the new room. Click **New Page or Folder**. Choose **Room**.
2. On the **Creating a New Room** form, enter a name for the room. Under **Menu position**, select the room's position in the table of contents.
3. Check the **Inherit membership from parent room** box ☒ to give the new room the same membership and access levels as the current place. Leave the option unchecked to set yourself up as the only member.

Note: Members added to the place at a later time will not be added to the room.

4. Click **Create**. The room link is visible only to those with room access.

To enter a room: click the room's link in the place's table of contents.

To leave a room: click the **Go Up** link in the room's table of contents.

Editing Rooms

To rename a room: click **Customize this Room**. On the **Room Options** page, click **Basics**. Enter a new name in the **Room Name** field and click **Done**.

To reorder the table of contents in a room: click **Customize this Room**. On the **Room Options** page, click **Basics**. Click an item in the **Reorder** box and use the up and down arrows to move the item. Click **Done**.

To add members to a room: click **Room Security** in the room's table of contents. On the **Manage Members** page, click on an access level (e.g. **Editors**), and then click the **Add** button for that level (e.g. **Add Editor...**). Check the box ☒ next to the members that you want to add to that access level and click **Submit**. Click **Done**.

Forms

A form is a created document template with specific information fields tailored to the type of author (e.g. a customer in the case of an order form) that will be filling them in. Available fields include pop-up lists, boxes for formattable text, sortable date, time, and name fields, and a host of others. You can choose from several types of customizable forms.

Types of Forms

The following types of forms are available in Quickr:

- **Simple Form:** uses standard Quickr fields that allow you to sort content. Options include date, attachment, and rich text fields.
- **Microsoft Office Form:** uses the contents of an existing Microsoft Word, PowerPoint, or Excel document as the basis for a new form.
- **Imported HTML Form:** uses the contents of an existing website (a file with the extension .htm or .html) on your computer to create a form.

Note: The Microsoft Office and Imported HTML form type are available through a free install from the New Form page (See *Creating a Form*, below).

Creating a Form

You can create a form to be used by all place members, or make the form available only to members who have at least Author access inside a room.

1. Click **Customize this place** in the table of contents. Alternatively, enter a room and click **Customize this Room** to create the form in that room.
2. Click **Forms** and then click **New Form**. Select the type of form you want to create (see *Types of Forms*, above) and click **Next**.
3. Add content to a simple form, or upload an HTML or Microsoft Office file to use as a template for your form.
 - For a Simple form, enter a title for the form, and click **Add...**. Click a field type (e.g. **Plain Text**), and then click **Next**. Set desired field options, and click **Next**. Repeat to add additional fields to the form.
 - For an HTML form, click **Browse** and select the HTML file you want to use for the form. Click **Open**.
 - For a Microsoft Office form, click **Browse** and select the file you want to use as a template for pages in the current room. Click **Open**.
4. Under **Workflow**, click **Modify...** and choose a workflow type (e.g. **Simple Submit**) and click **Next**.
5. On the next screen, fill in the appropriate options and click **Next**. Choose a document versioning option and specify a folder for content created with the form.

Note: If you do not specify a folder, the author or the final reviewer can specify where in the place the completed form should go.

6. Enter a description for the form, and then click **Done**.

Editing Forms

You can edit forms on the **Forms** page. To access this page, click **Customize this place**, or click **Customize this room** from within a room. Click **Forms**.

To edit a form: click the title of the form in the **Edit** list on the **Forms** page. Edit the form as needed and click **Done** to save your changes.

To choose which forms to display on the Create page: click **More Actions** and choose **Show/Hide Forms**. Check the boxes ☒ beside the forms that you would like to make visible to authors and click **Next**. Now, when an author clicks **New Page or Folder**, the **Create** page will only display the specified forms.

To reorder forms on the Create page: click **More Actions** and choose **Reorder Forms**. Select a form in the box and use the up and down arrows to reorder it. Click **Next**.







To fill out a form: from any place, room, or folder, click **New Page or Folder**, and select the form title from the list. Fill out the fields and click **Check In**. If necessary, select a location for the form, and click **Next**.





Working with the Calendar Folder

You can schedule and track events in the Calendar folder. Click Calendar in the table of contents to open the Calendar folder.

Calendar Views



Click one of the four icons at the top of the Calendar to view different Calendar formats.




Display two days		Display one month.....	
Display one week		Move backward	
Display two weeks		Move forward	




To hide the calendar: click  **Customize this place** in the table of contents. Click  **Basics** and, under **Show/Hide**, uncheck the **Calendar** box . The available links of pages can also be customized in this way. Click .

Using the Calendar

You can create a calendar event from the Calendar folder, or from any room or place that contains a calendar. You can also link content (e.g. an existing task) to the calendar and move calendar entries.

To create a calendar entry: click . Enter a title for the entry and, under **Calendar information**, enter date, start time, and duration details. Enter an event description and attachments as desired, and then click .

To link an existing task or post to a calendar slot: open the item that you want to link to and click . Check the **Show in Calendar** box , and enter a date, start time, and duration for the item if needed. Click .



To move a calendar entry: click **Index** in the table of contents, or **Room Index** if you are in a room. Check the box next to the entry's title , click  and choose **Move**. Select a destination for the entry. Click .




Subscribing to Calendar Events





You can send Quickr calendar events to your calendar in Lotus Notes or Microsoft Outlook by subscribing to Calendar Events.

Note: An administrator must enable the Calendar Events feature.

To subscribe to Calendar Events:

1. Click **Members** in the table of contents. In the Members folder, click on your name to open your profile. Click .
2. Under **Preferences**, select **Yes** under **Subscribe to calendar events**, and select a Calendar (e.g. Lotus Notes). Click .


To send new calendar events to other place members who have subscribed to calendar events: click **Calendar** in the table of contents, click  and choose **Folder Options**. Choose **Always** under **Send calendar events to subscribers**, and then click . Choose a location to save the folder on the Save Folder Options page and click . Subscribers will now receive a calendar event email when you create a calendar entry, or edit its date and time.

To email a calendar event link to specified recipients: create a calendar event and click . Under **Create**, check the **Notify** box . Click . Enter addresses in the **To:** field and click  twice to send the email.

Viewing Daily or Weekly News

Quickr displays a list of all items that were added or modified in a place, either in the last day or in the last week.

To view a list of new items: scroll down to the **What's New** area of the Home page. Click **Weekly News** to open a list of items that have been added or updated in the past week. From this page:




- Click **Daily News** to view a list of items added or updated today.
- Click **QuickBrowse**  to display the What's New list in a second browser window.

To update the What's New list: scroll down to the **What's New** area of the Home page and click **Update Now**.



Tasks Folder





The Tasks folder displays tasks as a list or as a set of timelines. You can display all tasks, or view important or incomplete tasks only.

Creating a Task

1. Go to the location where you want to create a task, click  **New Page or Folder** and choose  **Task**. Alternatively, to create a task in the Tasks folder, click **Tasks** in the table of contents, and then click .


Note: If the **Tasks** folder does not appear in the table of contents, it might have been renamed or removed by a place manager.

2. Enter a title for the task and specify task information (e.g. **Status**). Check the **Show in Calendar** box  to add the task to your calendar.
3. Enter a description of the task in the **Description** box. Click .

To notify members about task assignments: select the task you want to notify members about. Click  **Customize this place**, and then click  **Basics**. Under **Notifications**, check the **Notify those responsible when tasks are assigned and completed** box . Click .

Viewing and Editing Tasks

You can sort tasks by column when columns are displayed as a list. Open the Tasks folder to view and edit tasks.



To view the tasks as a timeline: click the timeline button . Tasks are displayed in bars that correspond to the start and end dates for the task.



To define the timeline time interval: click **Days** or **Weeks** in the top-left corner of the timeline view.

To view the tasks as a list: click the list button .

To sort task titles: in list view, click the title of the column that you want to sort by.

To display all tasks, milestone tasks, or incomplete tasks: click **All Tasks**, **Milestones**, or **To Do** in the top-right corner of the tasks list.

To edit a task: open the task by clicking on its title in the Tasks folder, and click . Modify the task and click  to save your changes.





To mark a task complete: open the task by clicking on its title in the Tasks folder, and then click . A checkmark  appears next to the task.

The Index Folder

The Index folder lists the content in the current place or room. You can open, move, and delete items from the Index folder.

Viewing and Managing Index Items

To display an item in the Index folder: click the item's title.





To move or copy Index items: select the item by checking the box  beside its title. Click  and choose **Copy** or **Move**. Choose a folder to which you want to move or copy the item and click . Click  if necessary.






To delete an Index item: select it, click  and choose **Delete**.

Viewing and Editing the Index Folder

To sort columns in the Index list: click a column title (e.g. **Type**). An up or down arrow is displayed, indicating the ascending or descending order of the column.

To view a summary of Index folder items: click the Table of all Entries button .

To choose the type of information you want displayed in the Index: click  and choose **Folder Options**. Under **Change the columns shown in this folder?**, check the **Show or hide columns** box . Click  and select the columns you want displayed. Click  twice.

To change column order: click  choose **Folder Options**. Under **Change the columns shown in this folder?**, check the **Change column order** box . Click  and click on a column title. Use the up  and down  arrows to reorder the columns. Click  twice.

Working with Documents

Documents include pages, tasks, calendar entries, posts, and imported files. You can edit documents that you have manually created, as well as documents that are automatically created, such as the Welcome page.

Creating Documents

Documents add content to your place which can contain file attachments and images. When you finish editing a document, you can publish the document, select additional document options, or save the document as a draft.

To create a document in a place, room, or folder:

1. Click **New Page or Folder** and select the document you want to create (e.g. **Task**).
2. Enter a title or topic, and add contents and attachments to the document.
3. Choose a document creation option:
 - **Check In**: publishes the document in the selected folder. If no location was specified, you will be prompted to select a location for the document.
 - **Check In with Options...**: you can select publishing options such as notifying selected members of new content, limiting readership and editing rights, and adding the document to the Calendar folder.
 - **Save As Working Draft**: saves the document as a draft and closes it.
 - **Cancel**: deletes your changes and returns you to the previous screen without creating a new document.

Checking Documents In and Out

You can check out any document for which you have editing rights. While the document is checked out, other members cannot make changes to it, or see your edits, until you check it back in.

To check out a document:

1. Enter the place, room, or folder that contains the document you want to check out. Click on the document's title to open it.

Note: If the document is already checked out, Quickr displays the name of the member who has checked it out.

2. Click **Check Out and Edit**.

To edit the document immediately: modify the document's information, such as its title, contents, and attachments, and click **Check In** to check the document back in.

To edit the document at a later time: click **Save As Working Draft**.

Working with Checked Out Documents

You can edit checked out documents – or return to the original version of a document – before checking it back in.

Enter the place, room, or folder that contains the checked out document. Click the document title and then click the **Draft in Progress** tab.

Note: Depending on the place or room, **Draft in Progress** may appear as a link below the tabs.

To check a document back in: click **Check In**. If prompted, select a location for the document.

To edit a checked out document: click **Edit**. Make changes to the document and then choose from the following document creation options:

- Click **Check In** to publish the edited version of the document so that other members can read and edit it.
- Click **Save As Working Draft** to create a draft version of the document that you can resume at a later time. The document will not be published.

To view the original version of the checked out document: click the **Published Version** tab or link.

To delete the draft version of the document and return to the original: click **Cancel Checkout**.

Moving and Copying Documents

You can copy documents to a folder, index, room, or, if you have manager access, to the table of contents.

1. Enter the place, room, or folder that contains the item and choose from the following options:
 - Open the document by clicking its title. Click **More Actions** and choose **Copy** or **Move**.
 - Click the arrow next to the document title and choose **Copy** or **Move** (if available).
2. Select a location to copy or move the document to, and then click **Next**.

Note: You must have author privileges or above to perform these actions.

Deleting Documents

Enter the place, room, or folder that contains the document you want to delete. Click the arrow next to the document title , or click **More Actions**, and choose **Delete**. Click **OK** to confirm the deletion.

Importing Documents

You can import different types of information into your place, such as Microsoft Office, HTML, or JPEG files. Quickr copies the file and inserts it into a new page.

To import a file into Quickr:

1. Enter the place, room, or folder in which you want to create a new imported page. Click **New Page or Folder** and choose **Imported Page**. Enter a title for the page.
2. Click **Browse** to select a file, or drag and drop a file from your desktop into the **Drop File Here!** box.
3. Click **Check In**. Choose a location for the imported content and click to publish the page with the imported content and click **Next**.

To import multiple files: enter the place, room, or folder in which you want to create a new imported page, click **New Page or Folder** and choose **Imported Page**.

Multiple Imported Pages. Click the folder icon to select files. Click **Check In**.

To create a document based on a new Microsoft Word, Excel, or PowerPoint file:

1. In the place, room, or folder that you want to create the document in, click **New Page or Folder** and choose **Microsoft Word Page**, **Microsoft Excel Page**, or **Microsoft PowerPoint file**.
2. Enter a title for the page and double-click the file icon (e.g. **Word Document**). The file opens in the appropriate software.
3. Edit the file, then save and close it.
4. Return to Quickr and click **Check In** to publish the page with the imported content. Choose a location for the content and click **Next**.

To upload a file or set of files to a library: in the table of contents, click **Library**, and then click **Upload**. Click , select the file(s) you want to attach, and then click **Open**. Enter a name for the file(s) and click **Check In**.

Creating Link Pages

Documents can include links to web pages outside your place. Clicking on a link displays the contents of the web page you created the link to.

1. Select a location for the link, click **New Page or Folder**, and choose **Link Page**.
2. Enter a title for the link page. In the **URL that this page should link to** field, type in the web page address you are linking to.
3. Choose whether or not the web page should open in a new window.
4. Click **Check In**. Choose a table of contents location for the link and click **Next**.

Receiving and Sending Mail

Places are automatically set up to receive and store mail in the Index. You can create mail messages, and send place invitations and newsletters.

Setting Up Your Mail

If you are a place manager, you can specify where in the place you want your mail to be delivered, or can choose to block all incoming mail.

To specify where your mail is delivered: click **Customize this place**, then click **Basics**. Under **Incoming Mail**, select **Yes, put new mail in room:** and select a destination for your mail (e.g. **This place's Index**). Click **Done** when finished.

To block the reception of email in your place: click **Customize this place**, then click **Basics**. Under **Incoming Mail**, click **No**.

Note: It can take up to five minutes before mail is directed to the new destination.

Reading and Creating Mail Messages

You can view incoming mail and create mail messages that include a link to the page from which it was sent. To read incoming mail, you must have reader access privileges or above for the room in which the mail is stored.

To read mail: enter the room that has been set up to receive mail (usually **Index** in a place or **Room Index** in a room). Click the title of the message to display it.

Note: Quickr stores very large mail messages as an attachment called MESSAGE.HTM. Click on the icon or file name to read the message.

To create a mail message:

1. Enter the folder from which you want to send a message. Click and choose **Notify**.
2. You can address the email message in the following ways:
 - Type in the recipient's email address, or, if the recipient's membership information includes an email address, type in their user name.
 - Click **To:** and select the recipients by placing a check ☒ beside individual or group names. Click **Next**.
3. Modify the subject line and add comments to the message. Click **Next**.

Sending Place Invitations

If you have manager access, you can send new members a place invitation when they are added to a place or when their access level is changed.

To send an invitation: click **Members** in the table of contents, then click . Click an access level (e.g. **Editor**), and enter the name of the member you want to add to that access level. Check the **Send an invitation to any new users who have email box** ☒ and click **OK**.

Note: When adding a group, all group members are sent an invitation.

Sending Newsletters

You can send members a customized newsletter on a daily or weekly basis.

Note: Your Quickr administrator must enable newsletter functionality.

To send newsletters:

1. Click **Customize this place**, then click **Basics**. In the **Notifications** area, ensure that the **Send a regular email news update to members box** ☒ is checked.
2. Click and select the items you want to appear in the notification email (e.g. **My Tasks**).
- Note:** The newsletter's Content Update section will display new items even if the **Content Update** box in this list is not selected.
3. Under **How often do you want the news summary to be sent?**, choose **Daily** (best for very active places) or **Weekly** (best for less active places).
4. Click **Next**, then click **Done**.

To view the daily or weekly newsletter: enter the room that has been set up to receive mail. Click the newsletter link to view it.

Working with Blogs

Creating a Blog Entry

Blog entries are displayed in your Blog folder.

1. In the Blog folder, click .
2. Enter a title for the entry and, in the **Blog Content** field, enter the text that you want displayed in the Blog folder.
3. Click **Add More...** to enter additional text that users can access when they open the blog entry. Click **Check In**.

Editing a Blog

To edit a blog entry: open the entry by clicking its title in the Blog folder. Click , modify the entry, and then click **Check In** to save your changes.

To add a comment to a blog entry: open the entry by clicking its title in the Blog folder. Click and enter text in the **Comments** section. click . Click **OK**.

To delete a comment: open the entry that contains the comment, and click .

Note: Readers and Editors can only edit comments that they have created.

To specify the number of entries displayed in the Blog folder: click . Enter a number in the **Show** **entries on home page** box and click **Check In**.

To display blog entries for a specific month: click the month in the Blog folder's **Archive** menu located below the calendar.

To add a link to the blogroll (blog list): in the Blog folder, click . Click **Add Link** under **Blogroll Links**. Enter the link title and URL, click , then click . Click **Check In**. The link is displayed in the Blog folder's **Links** menu.

To print a blog entry: in the Blog folder, click beside the blog entry's title. The entry opens in a new window, formatted for printing. Click again.

Performing a Search

You can search a place, room, or folder for items created by specific authors or on specific dates.

To enable Advanced Search: in the table of contents, click **Customize this place**, then click **Basics**. Check the **Advanced Search** box ☒ under **Show/Hide**. Click **Done**.

Note: You must have manager access to enable Advanced Search.

To perform a quick search: enter text into the **Search in this place** box at the top of the Quickr screen and press ENTER. Quickr will display a list of search results.

To perform an advanced search:

1. Enter the place, room, or folder that you want to search. Under **Place Tools**, click **Advanced Search**.
2. In the **Find pages in** field, click an area to search in (e.g. **This place**).
3. In the **Search for** field, enter text and choose a text option (e.g. **All of the words**). Enter an author's name, and/or the date to further limit your search.
4. Choose a sort option (e.g. **Most Matches**).
5. Click **Next**. Quickr displays a list of search results.

To open search results: choose one of the following:





- Click on an item's title in the list of search results.
- Click **QuickBrowse** to open a browser window with the list of search results displayed. Click on an item's title in this list to open it.

Ask the Help Desk



Here are the answers to some common questions about Lotus Quickr. Do you want to...

...add a group to your place?

If you have manager access, you can create groups and manage group membership. Adding members to groups makes it easier to set access levels when creating a room.

1. Click **Members** in the table of contents, then click  and choose **Work with Groups**. Click .
2. Enter a name and description for the group. Select members for the group by checking the boxes  next to their names. Alternatively, if expanded membership is enabled, click **Members**, select members and click **Add**, then click **Close**. Click .

To edit an existing group:

Click **Members** in the table of contents, and then click the group name in the list of groups. Click  and choose **Edit**. Make changes to the group, and click  to save your changes.

...add a logo to your place?

If you have manager access, you can add a place logo which will appear at the top of the table of contents.

To add an image as a place logo:

Click , and then click  **Basics**. Under **Place Logo**, click . Click , select the GIF or JPG file you want to use as your logo, and click . Click , and then click .

To change the logo text using the logo maker:

Click , and then click  **Basics**. Under **Place Logo**, click . Enter the text you want to use as the logo. Choose visual effects, animation options, accent, size, color, and font. Click , and then click .

...change the order of items in the table of contents?


You must have manager access to modify the table of contents.

Click , and then click  **Basics**. Under **Reorder**, click an item and then use the up  and down  arrows to reorder that item. Click  when finished.

...subscribe to a feed?

You can subscribe to feeds to receive updates in a room, folder, or page.

Note: Feed subscription must be enabled by a place manager.

In any folder or page, click  and choose **Subscribe**. Set up a feed according to your browser's instructions. Your browser will navigate to the feed content.

Lotus Quickr 8.2 Connectors

Lotus Quickr connectors allow you to integrate Lotus Quickr with various desktop applications. You can work with documents in Microsoft Windows Explorer, Microsoft Office applications, Lotus Notes, and Lotus Sametime. After installing the connectors, you can access and collaborate on Quickr documents regardless of the application you are working in.

Installing Quickr Connectors

You can install Lotus Quickr connectors from the Quickr Home page. After you install the connectors, you must connect to the Quickr server before you can access places from your desktop applications.

1. Log in to Quickr and, under the **Quickr Connectors** links at the bottom of your screen, click **Download**.
2. Click **Run** to launch the installation wizard. Follow the instructions in the wizard and click **Finish** to launch Lotus Quickr places list in Windows Explorer.

To connect to a Quickr server:

1. In Windows Explorer, right-click **Lotus Quickr** and choose **Add Places**.
2. In the **Server** field, type the server name (e.g. `http://nlearnseries.com`). Type in your user ID and password, then click **Next >**.
3. Select one or more places and click **Finish**.
4. Click **OK** to confirm your settings. A connection is established, and the selected place is added to the Lotus Quickr places list in Windows Explorer.

Working with Microsoft Windows Explorer

You can work with place folders and documents from the places list that appears in Windows Explorer. Any changes that you make in the places list will be synchronized with the Quickr server.

To add a place to your places list: right-click **Lotus Quickr** and choose **Add Places**. Enter a domain name in the **Server** field. Type in your User ID and click **Next >**. Select the places you want to add and click **Finish**.

To add a folder to your places list: right-click the place in which you want to create a folder and choose **New Folder**. Enter folder details and click **OK**. The folder is also added to the Quickr server.

To open a document from your places list: right-click it and choose **Open**.

Note: The document is not locked and can be accessed and edited by others.

To create a new version of a Quickr place document: right click the document and click **Versions**. Click **New**, type a brief comment of the version, and click **OK**. The new version is now the active version of the document.

To check out a document from your places list: right-click the document and choose **Check Out**. The document displays a lock icon and others are prevented from editing the document.

Note: You must have the required access levels to check a document in or out.

To check in a document: right-click the document and choose **Check In**.

To create a new document from the places list:

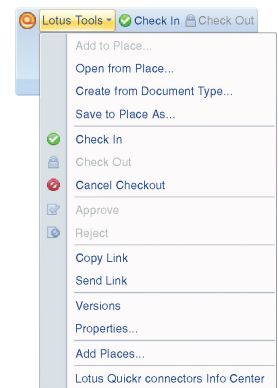
1. Open the place, room, or folder where you want to place the document. Right-click an empty space in the Windows Explorer page and choose **New**.
2. Select an application with which to create the document, enter a title, and then click **OK**. A blank document will be opened in the selected application.
3. Create the document and save it. The document is uploaded to the server and appears in the places list as checked out.

To add an existing document from your computer to a Quickr place: drag and drop the document into a place, room, or folder in the places list.

Working with Documents in Microsoft Office Applications

To edit a Quickr document in a Microsoft Office application:

1. Open the Office application where the document was created (e.g. Word).
 2. Click **Lotus Tools** ► **Open from Place** and select a document file.
- Note:** In Office 2007 applications, click the **Add-Ins** tab to view the **Lotus Tools** button.
3. Check the **Check out document** box ☒ to prevent the document from being edited by other members while you are working on it, or uncheck the box ☐ to open the document in read-only mode. Click **Open**.
 4. Edit and save the document in the application. The modified document is automatically saved in the place.



To unlock a checked out document: click **Lotus Tools** ► **Cancel Checkout**. Click **Yes**.

To add an Office document to a place: open the document and click **Lotus Tools** ► **Add to Place**. Select a place location for the document and click **Add**.

Working with Sametime

The Lotus Quickr pane in the Sametime window displays a places list from which you can collaborate on place documents with your chat partners. You can also work with documents from the Sametime places list as you would from Windows Explorer (see *Working with Microsoft Windows Explorer*, left column).

To collaborate on a document in a chat session: right-click the document in the Lotus Quickr pane and choose **Chat about Document**. In the **Invite to chat and share documents** window, enter a chat topic, select the people you want to invite, and click **Send**. Recipients who have the connector installed can right-click the document link in the chat invitation to open and edit the document.

Note: Recipients who do not have the connector will receive a URL to open the document through the server interface.

To send a link to a Quickr document during a chat session: from the places list in the Lotus Quickr pane, open the place that contains the document you want to link to. Right-click the document, choose **Chat about document with...** and select the name of the chat partner you want to send the link to.